



Pima County LWB

Labor Market Information

Introduction Summary

The Arizona Office of Economic Opportunity (OEO) produces demographic, labor force, regulatory, workforce, and economic information for Arizona and sub-state areas. OEO created the following summary of economic highlights for Pima County.

This section summarizes labor market and workforce trends occurring within the Pima County economy to help address and manage future workforce challenges.

- Pima County experienced a population growth of 42,509 individuals from 2010-2017 making it the 3rd largest population growth of all Arizona counties.
- Through 2021, its projected that 3/4ths of the county's population growth will be created from net migration (number of individuals moving to the county will exceed the number leaving the county).
- Pima County is a slightly older and poorer county with a higher median age, a lower median household income, and a higher rate of poverty when compared to Arizona and the United States.
- Pima County's population has a higher proportion of individuals with an Associate's degree or higher when compared to Arizona and the United States.
- Unemployment rates for Pima County workers are higher than the state rate for all education levels except those with a high school diploma. The unemployment rate for those with high school diplomas is 1.2 percentage points lower than the unemployment rate for those with a high school diploma across the state (Pima: 5.4%, Arizona: 6.6%, United States: 5.7%).
- Pima County has a higher rate of SNAP and Medicaid/AHCCCS users than either Arizona or the United States, but is close to the state average rate in use of TANF and SSI.
- Pima County has similar health coverage patterns to the state level; though there is a higher proportion of individuals receiving public coverage and a lower percentage of uninsured individuals.
- Pima County recorded declines in unemployment since 2010, with consistently higher levels of unemployment than the state.
- In September 2018, Pima County saw the largest over-the-year job growth in Education and Health Services (11.1%, 1,200 jobs); Professional and Business Services (3.7%, 2,200 jobs); and Construction (11.1%, 1,200 jobs).



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Economic Overview

Pima County

How to use data:

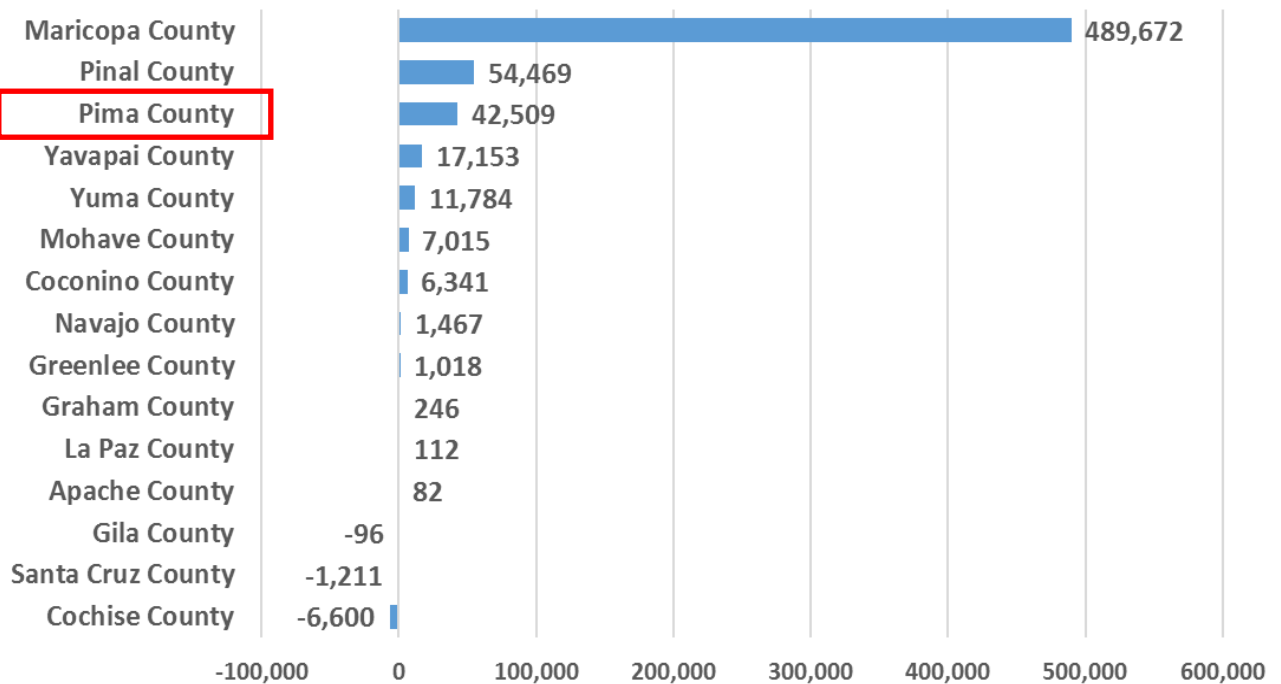
- Use data to drive decision, not validate decisions
- Use more than one source of data** – don't lock yourself into a single estimate, consider all of the available data to get the most accurate picture
- Know the limitations of your data set** – it's easy to accidentally misuse data and draw erroneous conclusions
- Become familiar with different data sets (or someone who is)** – there is no one place to find all the data you need

Immerse yourself in the data

Be prepared to accept surprising surprises



Population Growth by County (2010-2017):



Source: Produced by the Arizona Office of Economic Opportunity using 2017 Population Estimates (PEPTCOMP) in cooperation with the US Census Bureau

Maricopa, Pima, and Pinal Counties represented 94% of total population growth within the state; however, these counties are also the most populous. Pima County has recorded the 3rd highest population growth in Arizona counties.



Pima County Population Projections 2015 Medium Series

Year	Population	Population Change	Population % Change	Natural Change (Births-Deaths)	Total Net Migration (Inflows-Outflows)
2017	1,029,379	10,726	1.1%	3,009	7,572
2018	1,040,840	11,461	1.1%	2,977	8,336
2019	1,052,597	11,757	1.1%	2,958	8,648
2020	1,064,384	11,787	1.1%	2,921	8,712
2021	1,076,054	11,670	1.1%	2,872	8,641

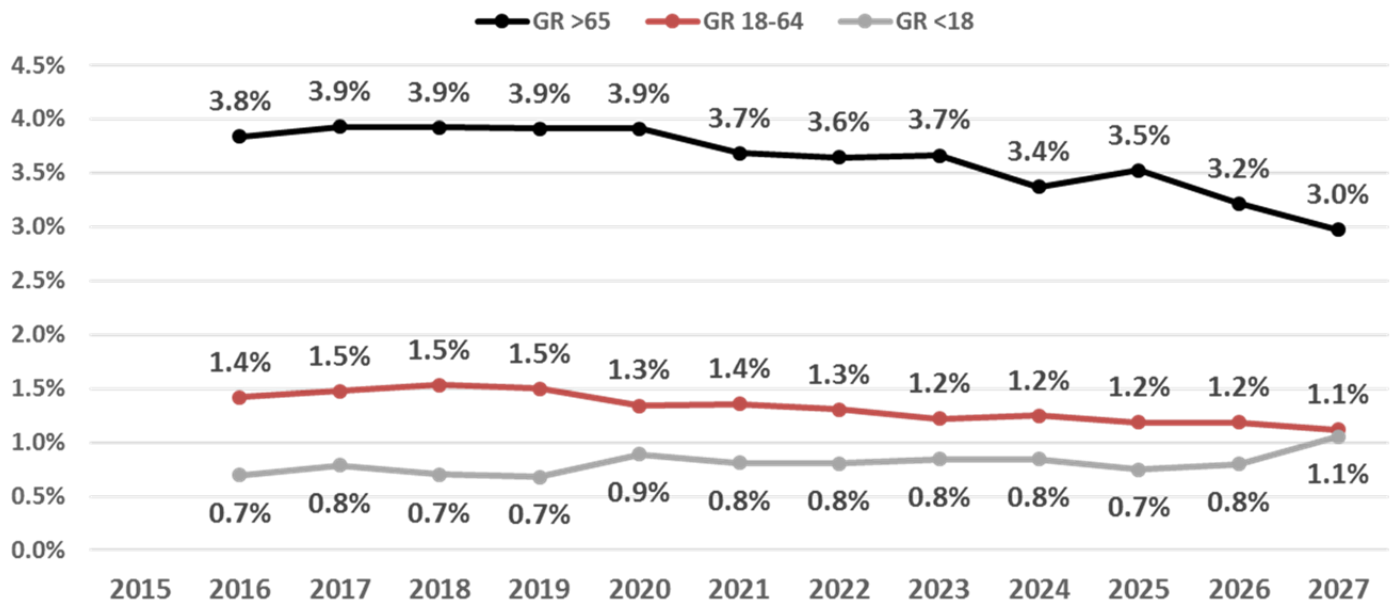
Pima County is projected to have modest, though slowing growth until the end of the projection period in 2050. Currently, approximately a quarter of this population growth will be created by natural change (number of births exceeding the number of deaths). Roughly three quarters of this population growth will be created by net migration (number of individuals moving to Pima County exceeding the number of individuals moving away from Pima County).

For more information on Pima County's population projections through 2050 please visit - <https://population.az.gov/population-projections>



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Arizona Population Growth Rate by Age Category, 2016-2027



Source: Arizona Office of Economic Opportunity 2015-2050 Population Projections, Medium Series

Chart note: data is for the whole state of Arizona

The 65 and over population is projected to grow at nearly 2-3 times the rate of the 18-64 age group and 3-4 times the rate of the 17 and under age group. The growth rate of the 65 and over cohort will steadily decline over the next decade. The 18-64 cohort will experience slower declines in their growth rate over the next decade. The 17 and under cohort will see modest increases in growth rates during the same period.



Population Characteristics (2017)

Indicator	Pima County	Arizona	United States
Median Household Income	\$51,425	\$56,581	\$60,336
Median Age	38.5	37.7	38.1
Individuals with a Disability between 18-64	12.7%	10.5%	10.3%
Veterans	7.3%	9.0%	7.3%
Poverty Status	16.7%	14.9%	13.4%
Mean Travel Time to Work (minutes)	24:7	25:36	26:54
Civilian Labor Force Participation Rate	57.0%	59.6%	62.8%
Population over 16	831,330	5,571,583	260,564,248
Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (DP03, B01002, S1810, S2101) in cooperation with the US Census Bureau			

- Pima County has a lower median household income than Arizona or the United States
- Pima County shows a higher rate of individuals with disabilities than the state or nation
- Pima County also has a lower percentages of veterans than the state as a whole but less than the nation
- Pima County has a higher rate of poverty and a lower labor force participation rate than the state or nation

These are some of the issues that can shape workforce development policies. Pima is a unique area with unique circumstances.



Highest Educational Level Achieved (Population over 25 years of age; 2017)

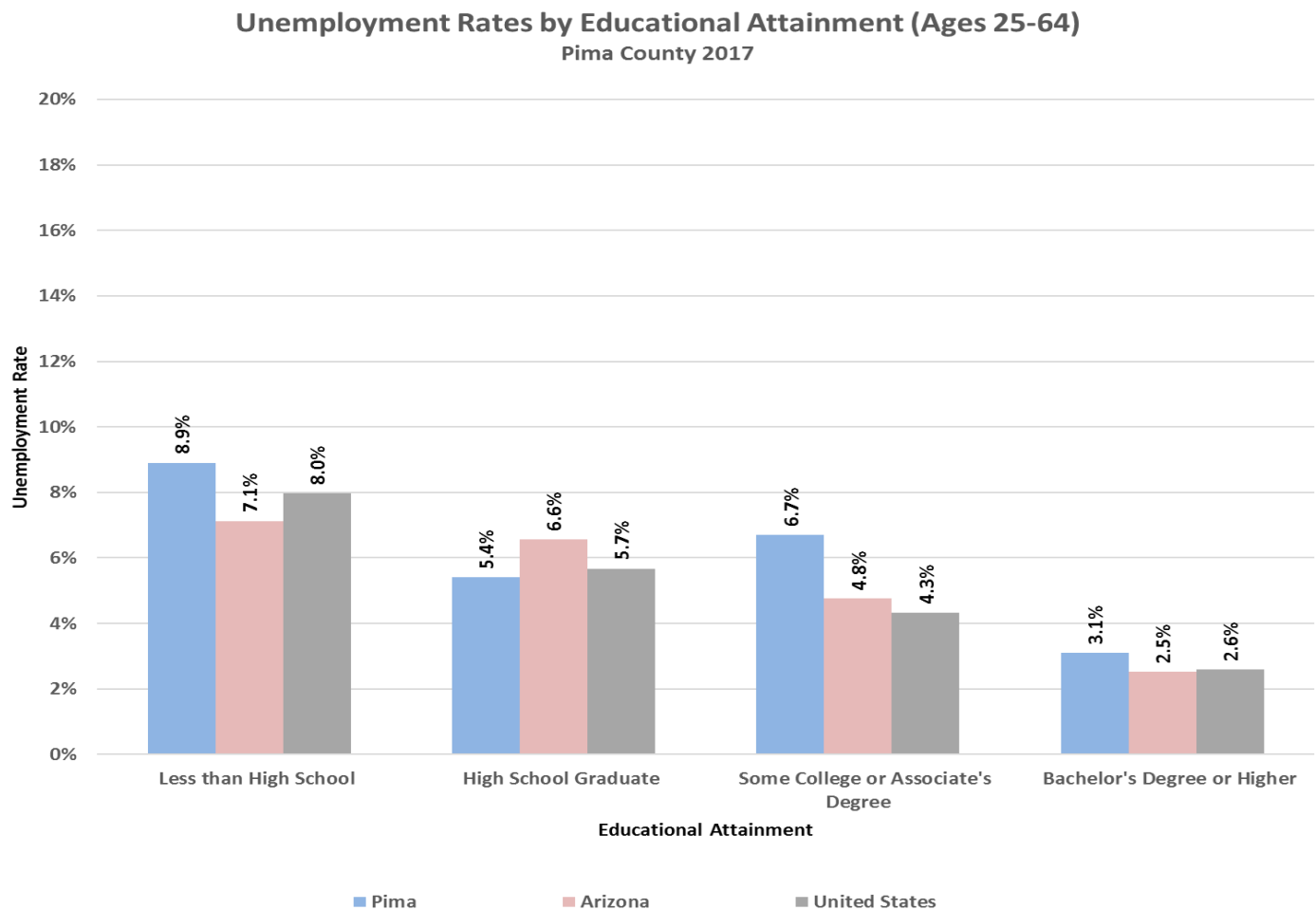
	Pima County	Arizona	United States
Less than High School	10.5%	12.8%	12.0%
High School Graduate (includes equivalency)	46.6%	49.1%	47.5%
Associate's Degree	9.3%	8.7%	8.5%
Bachelor's Degree	19.5%	18.3%	19.7%
Graduate or Professional Degree	14.0%	11.0%	12.3%
Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (S1501) in cooperation with the US Census Bureau			

Pima County has a greater percentage of the population with a post-secondary education (Associate's degree, Bachelor's degree, or Graduate/Professional degree) and a lower percent of individuals with High School or less than Arizona or the United States. In particular, Pima County has a higher percentage of the population (14%) that have a Graduate or Professional degree and a lower percentage of the population (10.5%) that have not obtained a high school diploma.



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Unemployment Rate by Educational Attainment (Ages 25-64) Pima County 2017



Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (B23006) in cooperation with the US Census Bureau

The unemployment rate for Pima County workers with a high school diploma is slightly lower than the rate for Arizona or United States with similar educational attainment. However, the unemployment rate is higher for individuals with less than a high school diploma and for those with a post-secondary education than the state or the nation.



Pima County Public Assistance Households (2017)

	Pima County	Arizona	United States
TANF (Temporary Assistance for Needy Families)	1.5%	1.6%	2.3%
SSI (Supplemental Security Income)	4.6%	4.3%	5.3%
SNAP (Supplemental Nutrition Assistance Program)	13.3%	10.8%	11.7%
Medicaid/AHCCCS (Arizona Health Care Cost Containment System)	18.0%	17.4%	15.3%
Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (DP03, B27010) in cooperation with the US Census Bureau			

Chart note: TANF, SSI, and SNAP proportions are based on households, while Medicaid/AHCCCS proportions are based on individuals.

Pima County has comparable rate of TANF and SSI utilization than Arizona or the United States. However, the county has a higher rate of utilization of SNAP and Medicaid/AHCCCS than the state or nation.



Pima County Health Insurance (2017)

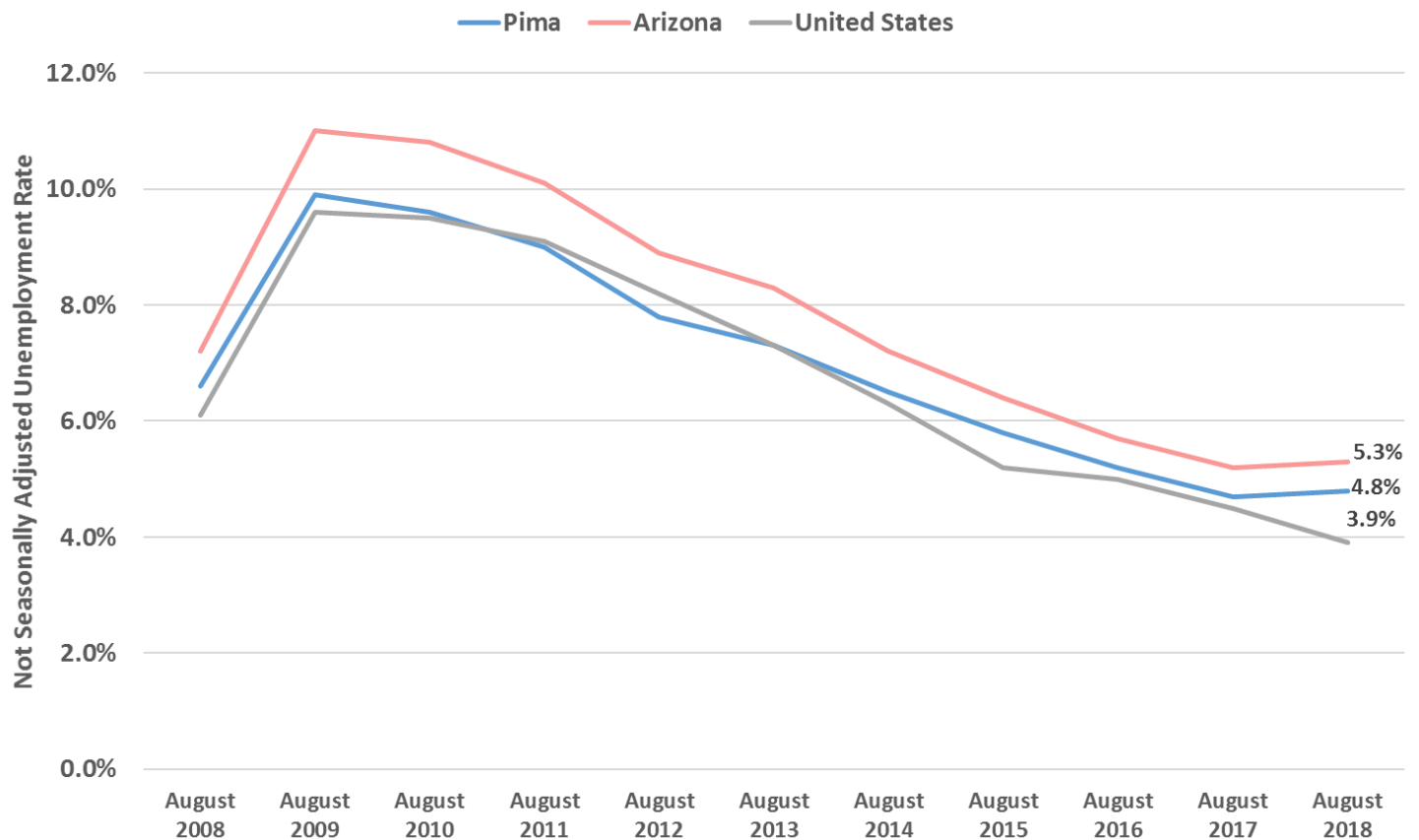
	Pima County	Arizona	United States
Private Coverage Only (Employer, Direct-Purchase, TRICARE)	47.3%	49.1%	54.1%
Public Coverage Only (Medicare, AHCCCS, Veteran's Admin.)	26.1%	24.2%	20.9%
More than one source of health care coverage	18.4%	16.6%	16.3%
Uninsured	8.3%	10.1%	8.7%
Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (B27010) in cooperation with the US Census Bureau			

The sources of health coverage in Pima County follows a similar pattern to Arizona and the United States, though there is a higher proportion of individuals receiving public coverage and a lower percentage of uninsured individuals. In addition, the county has a lower proportion of individuals with only private coverage, though a higher proportion of people that have more than one source of coverage. However, 66% of the individuals that have dual coverage are over 65 and of that population half have dual coverage because they are combining private or direct purchase with Medicare coverage.



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August Unemployment Rate Comparisons Pima County, Arizona, and United States Historical Rates



Source: Office of Economic Opportunity in cooperation with the US Department of Labor, Bureau of Labor Statistics using Local

In general, Pima County's unemployment rate has trended below Arizona's rate.



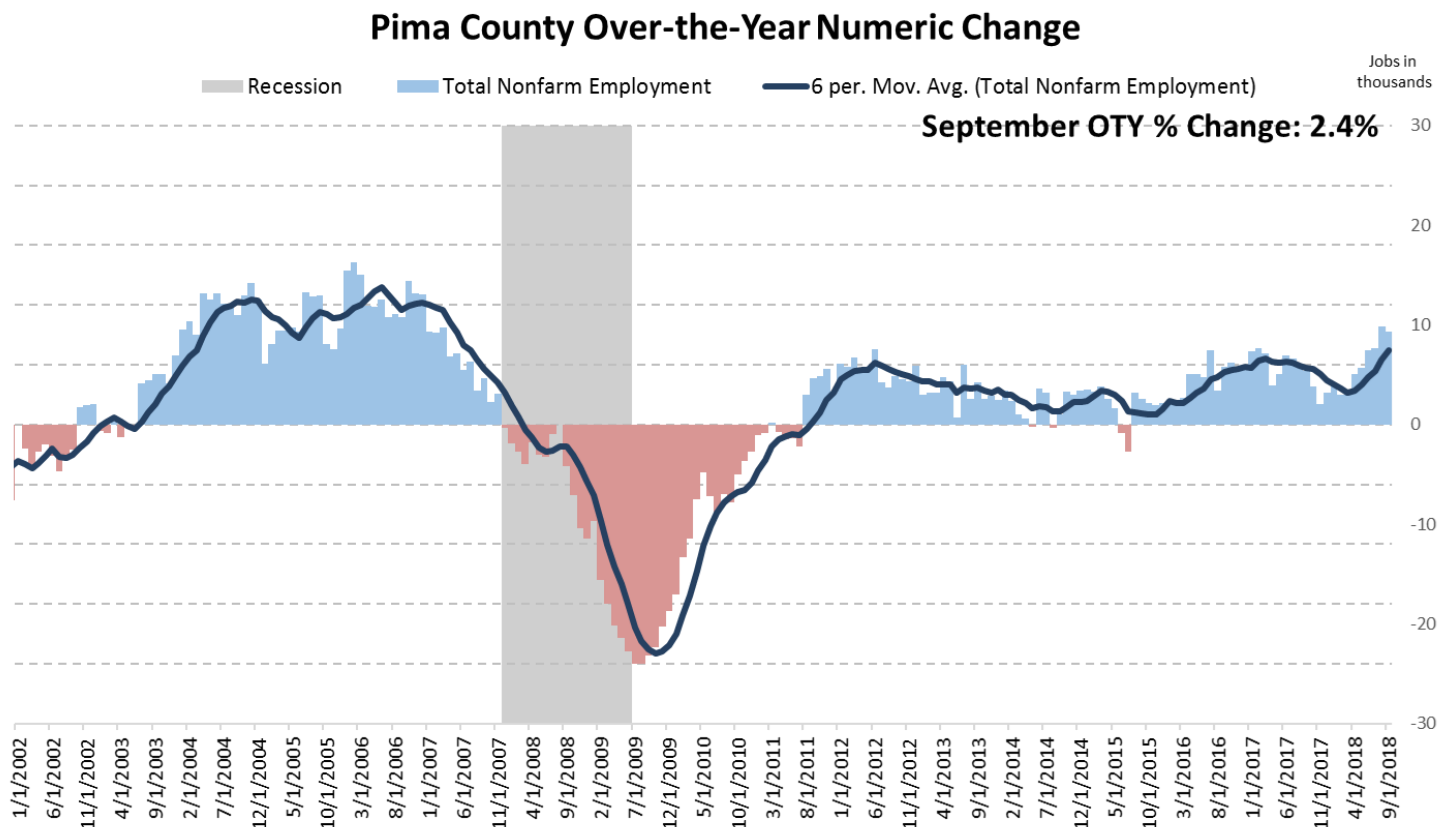
Pima County Industry Nonfarm Employment Share 2001 and 2017 Annual Averages

Industry	Employment Share 2001	Employment Share 2017	Change
Educational and Health Services	12.1%	17.3%	5.2%
Professional and Business Services	12.0%	13.7%	1.6%
Leisure and Hospitality	11.1%	11.8%	0.7%
Financial Activities	4.2%	4.6%	0.4%
Trade, Transportation, and Utilities	16.1%	16.2%	0.1%
Other Services	4.1%	3.4%	-0.7%
Information	2.3%	1.4%	-0.9%
Government	21.4%	20.5%	-0.9%
Mining and Construction	7.1%	4.6%	-2.5%
Manufacturing	9.5%	6.4%	-3.1%
Total	100%	100%	0.0%
Source: Produced by the Arizona Office of Economic Opportunity using CES data in cooperation with the US Department of Labor, Bureau of Labor Statistics			

Pima County's economy has changed in the 21st century. While total employment has grown, the distribution between industries has changed over time. Manufacturing employment has lost the most shares (-3.1%). It is followed by Mining and Construction (-2.5%) and Government (-0.9%). Generally, the Mining and Construction sector is dominated by Construction. These sectors lost shares while employment in three sectors gained roughly equal shares: Educational and Health Services (5.2%); Professional and Business Services (1.6%); and Leisure and Hospitality (0.7%). Generally, Educational and Health Services is dominated by Health Services.



Pima County Nonfarm Employment Historical Over The Year Numeric Changes



Source: Office of Economic Opportunity in cooperation with the US Department of Labor, Bureau of Labor Statistics using Current Employment Statistics (CES)

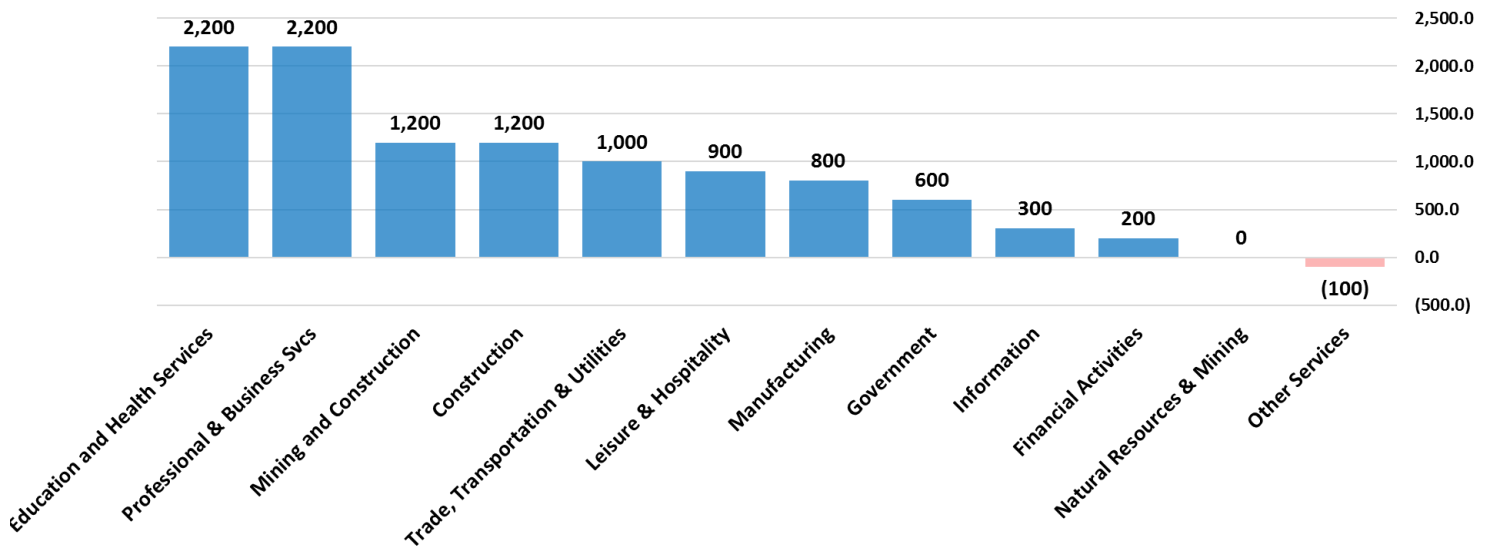
Pima County has reported modest and consistent annual total nonfarm job growth since 2011, with the one exception being a small period of declining growth in the summer of 2015.



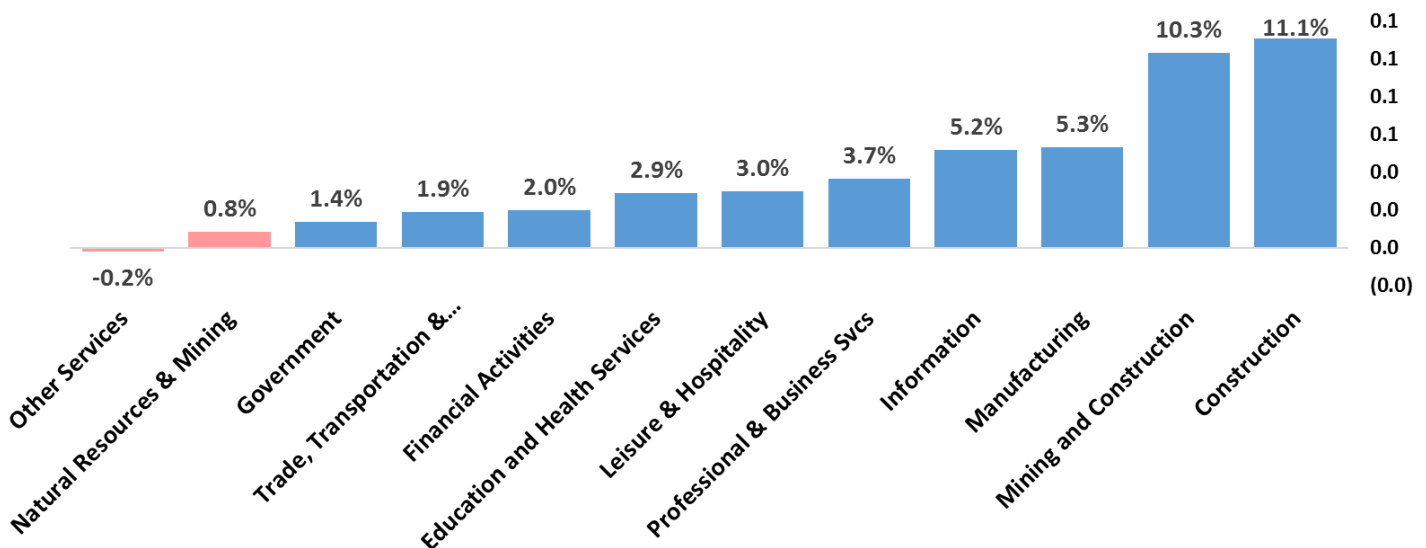
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September 2018 Nonfarm Employment Report

Pima County Numeric Over-the-Year Employment Gain/Loss by Sector; Sept. 2018



Pima County Percentage Over-the-Year Employment Gain/Loss by Sector; Sept, 2018



Source: Office of Economic Opportunity in cooperation with the US Department of Labor, Bureau of Labor Statistics using Current Employment Statistics (CES)

In September 2018, Pima County saw Education and Health Services job growth of 2.9% (2,200 jobs); Professional and Business Services job growth of 3.7% (2,200 jobs); and, construction related job growth which is captured in both Mining and Construction job growth of 10.3% (1,200 jobs) and Construction job growth of 11.1% (1,200 jobs).



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2017-2019 Pima County Industry Employment Projections

Industry Title	2017	2019	Numeric Change	Percent Change
Total All Industries	392,316	405,671	13,355	3.4%
Health Care and Social Assistance	62,130	64,883	2,753	4.4%
Admin. & Support & Waste Management & Remediation	30,385	32,123	1,738	5.7%
Administrative and Support Services	29,699	31,430	1,731	5.8%
Manufacturing	23,884	25,347	1,463	6.1%
Ambulatory Health Care Services	21,653	22,990	1,337	6.2%
Accommodation and Food Services	39,625	40,826	1,201	3.0%
Construction	15,819	17,019	1,200	7.6%
Food Services and Drinking Places	31,858	32,960	1,102	3.5%
Specialty Trade Contractors	11,665	12,628	963	8.3%
Professional, Scientific, and Technical Services	19,140	20,088	948	5.0%
Hospitals	18,999	19,618	619	3.3%
Retail Trade	42,115	42,704	589	1.4%
Social Assistance	11,033	11,610	577	5.2%
Transportation and Warehousing	8,417	8,989	572	6.8%
Arts, Entertainment, and Recreation	8,514	8,978	464	5.4%
Amusement, Gambling, and Recreation Industries	7,137	7,538	401	5.6%
Finance and Insurance	11,207	11,550	343	3.1%
Information	5,374	5,679	305	5.7%
Truck Transportation	2,068	2,338	270	13.1%
Insurance Carriers and Related Activities	4,477	4,746	269	6.0%
Government	27,942	28,209	267	1.0%
Other Services (Except Government)	14,657	14,909	252	1.7%
Nursing and Residential Care Facilities	10,445	10,665	220	2.1%
Local Government, Excluding Education and Hospitals	14,538	14,757	219	1.5%
Construction of Buildings	2,574	2,769	195	7.6%
Wholesale Trade	8,055	8,246	191	2.4%
Food and Beverage Stores	9,458	9,638	180	1.9%
Educational Services	37,768	37,933	165	0.4%
Educational Services	37,768	37,933	165	0.4%
Repair and Maintenance	4,001	4,164	163	4.1%
Building Material and Garden Equipment and Supplies Dealers	2,823	2,982	159	5.6%
Motor Vehicle and Parts Dealers	5,792	5,949	157	2.7%

A full list of employment projections can be found at Laborstats.az.gov



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2017-2019 Projected Job Growth by Region

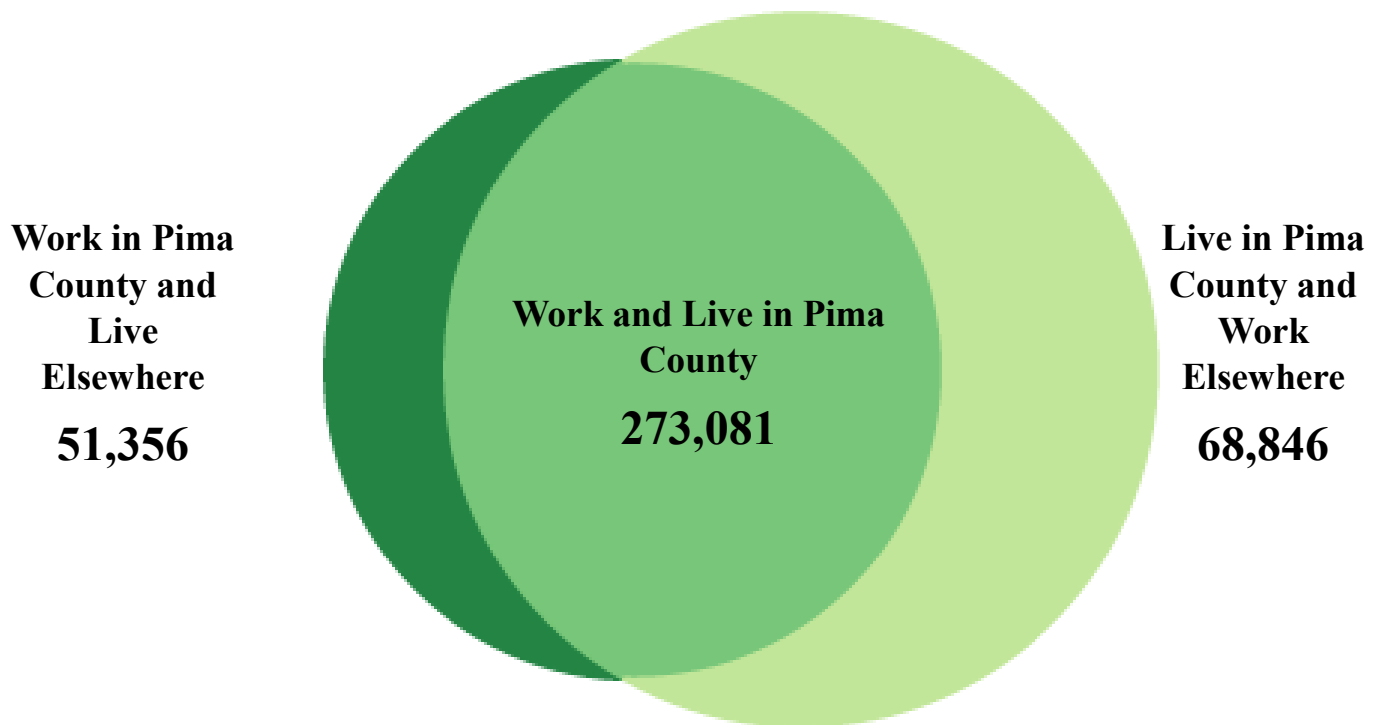
Area Name	2017 Estimated Total Employment Level	2019 Estimated Total Employment Level	2-year Numeric Growth	2-Year Annualized Percentage Growth
Arizona	2,933,968	3,086,936	152,968	2.6%
Coconino County	70,107	72,350	2,243	1.6%
Maricopa County	2,067,036	2,190,157	123,121	3.0%
Mohave and La Paz	59,173	61,573	2,400	2.0%
Northeastern Arizona	74,509	76,772	2,263	1.5%
Pima County	392,316	405,671	13,355	1.7%
Pinal County	66,356	69,239	2,883	2.1%
Santa Cruz County	15,080	15,156	76	0.3%
Southeastern Arizona	53,375	55,103	1,728	1.6%
Yavapai County	69,233	72,103	2,870	2.1%
Yuma County	66,281	68,306	2,025	1.5%

Arizona Office of Economic Opportunity 2017-2019 Industry Projections

The different regions in Arizona are projected to experience job growth during the projections period. Some are projected to grow faster than others, but the growth rates are projected to be positive.



Pima County Commuting Patterns Pima County 2015



Source: Produced by the Arizona Office of Economic Opportunity using On The Map in cooperation with the US Census Bureau

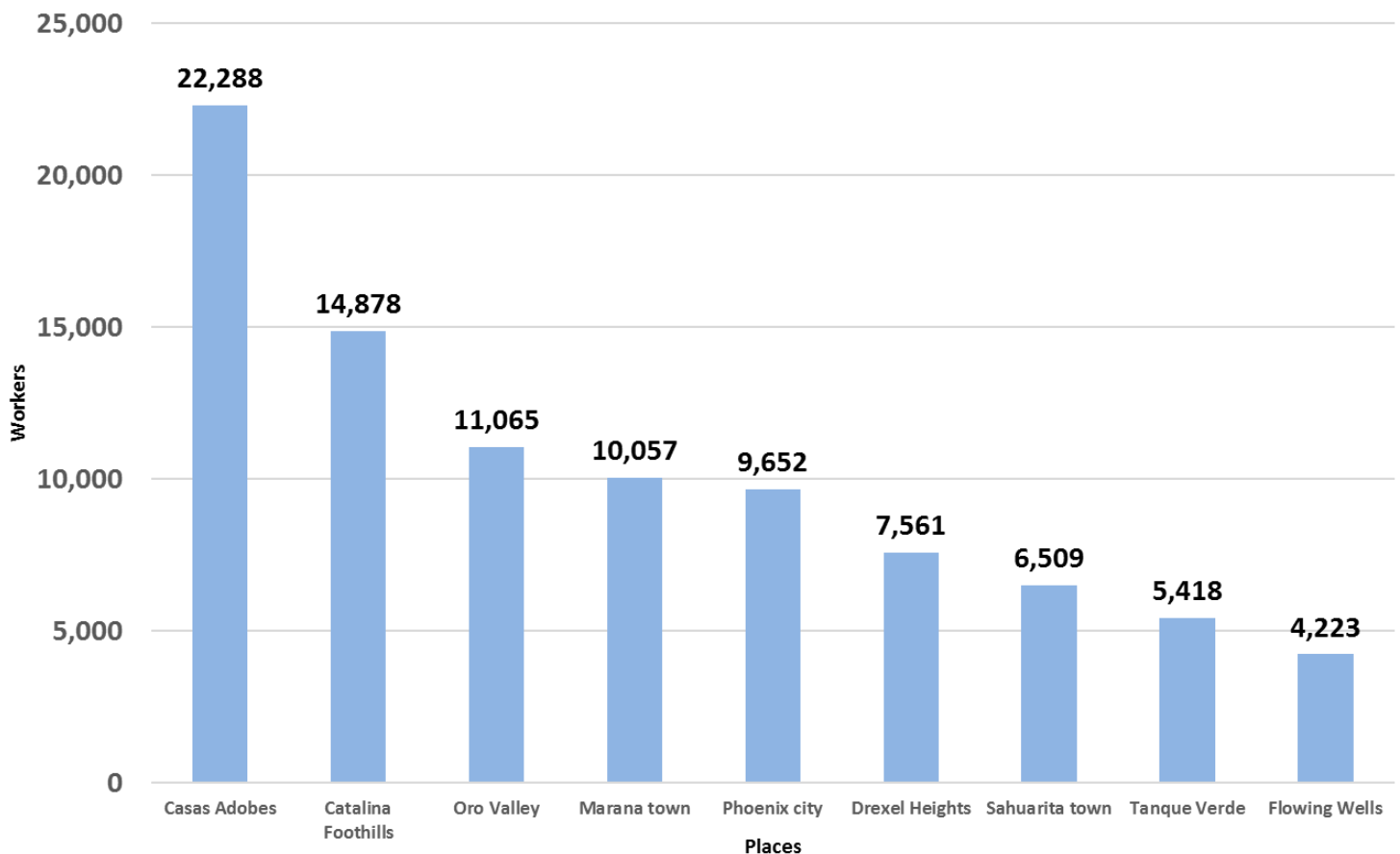
On The Map can provide information about commuting patterns for residents and workers within Pima County. Approximately 84.2% of Pima County workers also live in Pima County, but there are both inflows and outflows. Pima County has more workers leaving the area for work when compared to the coming into the area for work.

The dark green circle represents the population that works in Pima County (324,437 individuals). The light green circle represents the population that lives in Pima County (341,927 individuals). The area where the circles overlap represents the population that both lives and works within Pima County (273,081 individuals).



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Top 9 Places of Residence for Pima Workers (excluding Tucson) Pima County 2015



Source: Produced by the Arizona Office of Economic Opportunity using On The Map in cooperation with the US Census Bureau

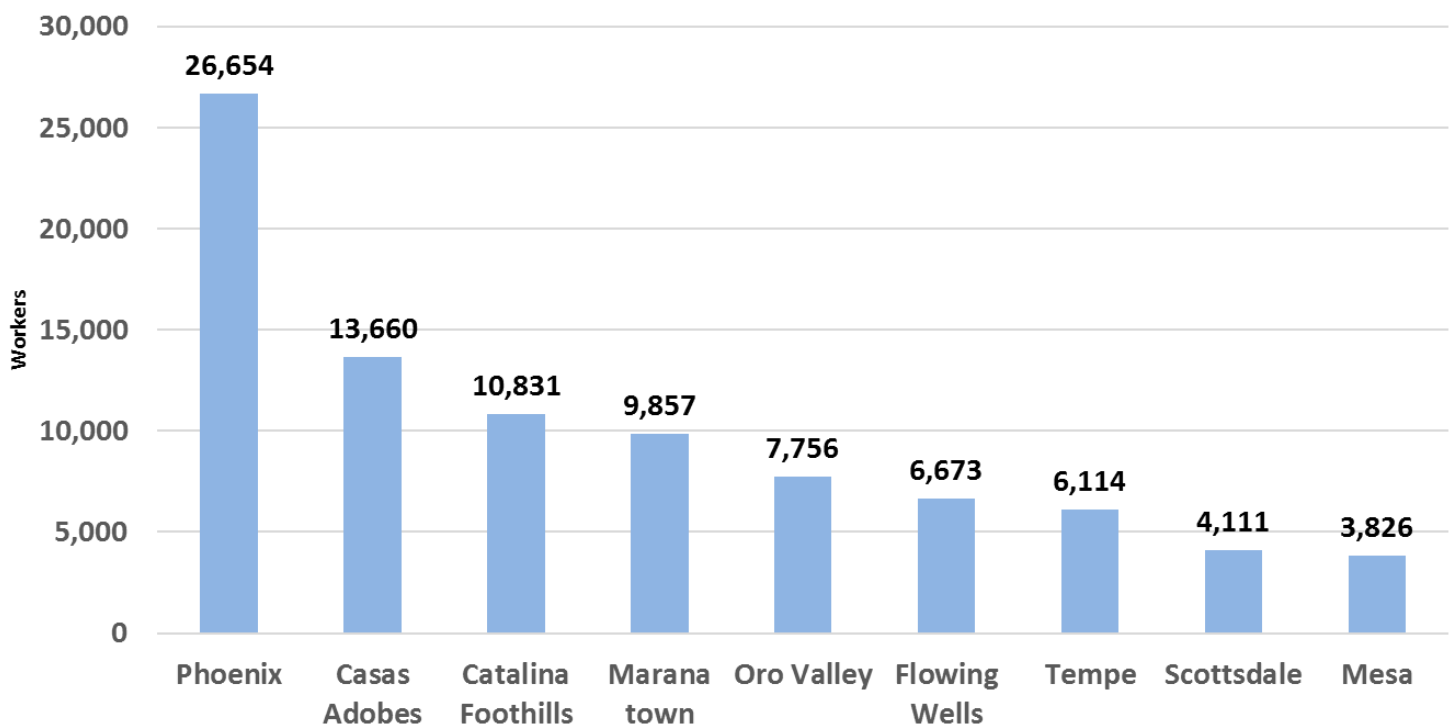
Of the 324,437 individuals who work in Pima County, these are the top nine places where these individuals live (dark green circle). Tucson is home for a large number of workers in Pima making up 45.6% of the workforce. The nine above collectively make up the next 28.3% of concentrated employment in the area.

- 147,883 individuals who work in Pima County live in Tucson (45.6%).
- 22,288 individuals who work in Pima County live in Casa Adobes (6.9%)
- 84,903 individuals who work in Pima County live in other non-specified locations (26.2%)



Top 9 Places of Employment for Pima County Residents (Tucson Excluded)

Pima County 2015



Source: Produced by the Arizona Office of Economic Opportunity using On The Map in cooperation with the US Census Bureau

Of the 341,927 individuals who live in Pima County, these are the top 9 places where these individuals work (light green circle). Tucson is the top place for Pima County residents to work, but it was excluded because the scale would have made the 8 places listed incomprehensible.

175,976 of the 341,927 individuals who live in Pima County work in Tucson (51.5%). In addition, 22.4% of the Pima County population, or 74,469 individuals, work in un-specified locations.



Data Sources

LaborStats.az.gov

Employment Data:

laborstats.az.gov/employment

Unemployment Data:

laborstats.az.gov/unemployment

Wage & Income Data:

laborstats.az.gov/wages-income

Employment Projections Data:

laborstats.az.gov/employment-forecasts

Population Data:

laborstats.az.gov/population

Other Labor Market Data Sources

Commuting Patterns Data:

On the Map: onthemap.ces.census.gov/

Demographics Data:

American Community Survey: census.gov/programs-surveys/acs/

Personal Income and State GDP Data:

US Bureau of Economic Analysis: bea.gov/regional/index.htm

Interactive Employment Mapping

Maricopa Association of Governments: <http://geo.azmag.gov/maps/azdemographics/>

Skills and Training Requirement Data:

O*NET: onetonline.org/find/descriptor/browse



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